

CHAPTER 9

VISITS, INSPECTIONS, AND MEETINGS

As a member of the Career Recruiting Force (CRF), most of your time will be dedicated to interface with your recruiters. Effective station visits, inspections, and meetings require planning, preparation, and professional application. Your approach to these encounters will set the tone for the zone. The zone supervisor (ZS) can do more than any other individual to affect the attitude of a zone. In our business of sales, attitude is everything. By taking time to be well prepared and purposeful, you can make sure you are spreading the right attitudes. This chapter provides guidance in both the preapproach and conduct of station visits, inspections, and meetings.

STATION VISITS

Effective station visits do not just happen. They require some advance work to make sure they are productive for the station. We'll cover planning, preparation, and conduct of the station visit to make sure you do not become a "professional visitor." You've heard of these supervisors. They spend all their time in the stations, using the phone, telling sea stories, and generally wasting everyone's time. We want to go with a plan, take care of business, and leave as planned.

PLANNING AND PREPARATION

Proper planning and preparation will result in effective station visits that save you and your people time. You will use your ZS itinerary/planner to publish your planned station visits for the month. Before issuing your planner, you must consider the frequency of visits and the purpose or agenda of each visit.

Determining Frequency of Visits

There is no magical number of times you should visit each station in the zone during the month. You will have to make judgement calls based on your observations and experience. Some considerations include the experience level of the recruiter in charge (RINC), training requirements, systems development, and actual productivity of the station. Be careful not to ignore the successful stations nor overvisit the struggling stations. The successful RINC's need attention, too. You may learn from them as well as help them improve. Most successful RINC's take pride in showing you what they are doing right. Struggling

RINC's need to be trained and then be given the breathing room to put the training to work. Try not to overwhelm them. We know our visit is going to be an interruption to normal business, no matter how hard we try not to interfere. Weekly visits work well for most stations. Geography, distance, and special circumstances may require a different schedule. You may want to plan several days in a row with newly assigned RINC's. Then give them some time to take the training on board before visiting again.

Developing Your Agenda

It is important to let the RINC know your planned agenda before the station visit. The RINC can make sure personnel who need to be present plan for the visit. Let the RINC know what you intend to look at and the inclusive hours of the visit. Review previous months' logs and reports, past station visit notes, training requirements, and your ZS tickler to develop your plan. Some items will be checked at each station visit, some monthly, and others as you determine the need. Let's take a look at some items you will need to review before planning an agenda.

PREVIOUS PROSPECTING AND PROCESSING RESULTS.— Review all information on previous prospecting and processing results. Check production reports, Production Analysis/Training Evaluation (PATE) sheets, and applicant logs. You are looking beyond the obvious of whether or not the station is making goal. Find out where you can give the most help. Increasing the effectiveness of all stations, even those making goal, is your objective.

LOCAL EFFECTIVE ACCESSION DELIVERY SYSTEM AND NATIONAL LEAD TRACKING SYSTEM.— Review all LEADS and NALTS reports. Compare conversion ratios with other stations in your zone and the district average. Be especially attentive of any overdue, delinquent, or forced-closed leads. Identify new leads you intend to check on during the station visit.

PLAN OF ACTION AND MILESTONES.— Review POA&Ms and inspection discrepancy corrective action plans that pertain to the station and determine follow-up requirements.

SHIPPERS.– Review shipping lists. Make note of any identified attrites and overall attrition problems. Compare recruit training center (RTC) and delayed entry program (DEP) attrition percentages to the rest of your zone and Navy recruiting district (NRD).

RECRUITER QUALIFICATION STANDARDS.– Review RQS status of all personnel and determine training needs.

KIT ERROR FEEDBACK REPORTS.– Review the past month's kit error feedback reports. Look for any recurring errors with special emphasis on those that delayed applicant processing.

STATION VISIT SHEETS.– Most districts provide a station visit sheet to make notes on planned and accomplished activity at each station visit. A sample station visit sheet is provided in figure 9-1. Notice that all items are not checked on each visit. The form merely provides a guide. Lines are left open for additional requirements. You may want to circle or highlight items you plan to check on the visit sheet before you arrive at the station. You should make two copies of the completed visit sheet—one for the RINC and one for your records. Review past station visit sheets to remind you of follow-up items.

Take Appropriate Materials

Conduct a mental checklist to make sure you are taking all needed materials. You are setting an example when you visit. Make sure you are prepared.

CONDUCTING YOUR STATION VISITS

Every station visit will be different. The personnel are different and the requirements are different. The following paragraphs, however, apply to all visits.

Be On Time

Timeliness is essential for station visits. Arrive and depart on schedule. RINC's need to be able to plan their time. You need to set an example.

Look Through Prospect's Eyes

As you enter the station, look around as a prospect might. What image of the Navy is being projected? The physical appearance of the office will probably give you a clue to other aspects of the station operation.

Set Some Rapport

Set some rapport before you get down to business. Take a few minutes to greet each recruiter as well as the RINC. Take an attitude check, be upbeat, and then get on with your planned visit.

Control Phone Use

Your station visit is planned training time for the RINC. That time belongs to the RINC you are visiting. Do not allow others to steal it away. You should have a policy in your zone that restricts phone calls during scheduled training time, unless they are emergencies.

Don't Dethrone the RINC

Ask the RINC which desk you should use. We work hard at encouraging station ownership. When supervisors come in and immediately take the RINC's desk, they are subtly taking over that ownership. You are there to train, not to assume the watch.

Follow Your Plan

Don't be easily sidetracked. Follow your plan. If the RINC has additional requests for assistance, weigh them against what you have planned. If you have planned to check items of concern, do that first. Then, if time allows, add the RINC's requests. Otherwise, work out a schedule to provide the RINC's requested assistance later.

Recognize That You Are an Interruption

Leave when you have-completed your objectives. Save all day visits for when you are concerned about overall station operation or have a specific reason.

Catch Them Doing Something Right

Look for things you can commend the RINC and recruiters on. Sometimes we get so caught up in looking for ways to improve, we forget to let them know what they are doing right. Being a "good finder" will make them more receptive to the ideas you have for improvement. It also can help remind you to pass on the ideas that are working to other RINC's.

STATION VISIT SHEET				
NRS: RINC:		DATE: CONDUCTED BY:		
NOT ALL ITEMS CHECKED AT EVERY VISIT (MARK S-SAT, NI-NEEDS IMPROVEMENT, OR U-UNSAT, EXPLAIN NI AND U MARKS)	S	NI	U	COMMENTS
APPEARANCE (EVERY VISIT)				
STATION PLANNER (EVERY VISIT)				
ACTIVITY ANALYSIS (APPLICANT LOGS/PATE SHEET/PLANNER)				
SMART BOARD				
SCHOOL FOLDERS (1ST VISIT EA. MON.)				
ITINERARIES				
DEP MANAGEMENT (STATUS BOARD, CONTACT, REFS, EXECUTIVE SCREEN RESULTS)				
P-CARD SYSTEM (WORKING TICKLERS, MARKET ID, DOCUMENTATION)				
RECRUITING RECOGNITION FORMS				
LEADS/NALTS				
TRAINING RECORDS (GMT/FORMAL/RQS/OJT)				
RQS REPORT & PROGRESS				
SHIPPERS				
POA&Ms/INSPECTION CORRECTIVE ACTION				
EST MATERIALS				
TICKET/TOKEN/MEAL LOGS				
STATION FILES & PUBS				
VEHICLES AND LOGS				
KIT QUALITY CONTROL				
TRAINING PROVIDED:				
FOLLOW-UP ITEMS:				
REMARKS:				

Figure 9-1.-Sample station visit sheet.

Always Leave On a Positive Note

Regardless of the results of a visit, leave on a positive note. If the visit was less than satisfactory, let them know you have faith in their ability to overcome the problems.

RECORDKEEPING AND FOLLOW-UP

You should organize your reports, logs, and station visit sheets so everything you need on a station is easily accessible. We'll describe two methods of recordkeeping that can help in your organization and follow-up endeavors.

Station Folders

Many ZSs keep individual station folders. Everything on that station can be filed there. As an example, you can put station visit sheets on one side and all reports and applicable correspondence on the other. This way, you only need to take one folder with you on the road.

Zone Notebook

Most ZSs have some sort of zone notebook, even if they use individual station folders. The zone notebook should include current and past reports, logs, and information pertinent to the zone. You may want to include a section for each station instead of using the folders. The advantage is having all information in one reference volume. The disadvantage is the notebook may end up quite cumbersome.

NAVY RECRUITING STATION INSPECTION AND DISCREPANCY CORRECTION PROGRAM

The purpose of the Navy recruiting station inspection and discrepancy correction program is to identify all zone, station, and recruiter deficiencies and make sure corrective action is taken through a systematic plan. Necessary training can then be conducted to resolve those deficiencies. When problems or discrepancies are noted during a visit or an inspection, corrective plans must be initiated to cover all major problems. Major problems are defined as those that affect production, recruiter development, and/or NRS operations that must be corrected in a timely manner. The program includes inspections conducted by the Mobile Inspection and Training Team (MITT), and periodic, turnover, and production

inspections. We'll cover each inspection and related reporting requirements.

MOBILE INSPECTION AND TWINING TEAM

The MITT is made up of experienced recruiting managers who identify problems and provide on-the-spot training and suggested corrective action. MITT inspections are scheduled every 12 to 24 months, with every 18 months being the norm. Scheduled MITT inspections are published in advance and conducted using the MITT checklist that is available through your Commander, Navy Recruiting Area (CNRA) headquarters. MITT inspections include every department of the NRD. Field inspectors meet with ZSs and inspect predetermined stations within the zone. Each station inspected and the zone receive an inspection report.

PERIODIC INSPECTIONS

Each Navy recruiting station (NRS) not inspected by the MITT must be inspected within 4 months following the MITT inspection by upper management of the NRD. Authorized inspectors include the commanding officer (CO), enlisted programs officer (EPO), chief recruiter (CR), ZS from another zone, and designated CNRA inspectors accompanied by the ZS. These inspections are conducted using the MITT checklist. This inspection format is also used by the incoming and outgoing RINC's during a normal turnover or by the ZS before the relief of any RINC.

PRODUCTION INSPECTIONS

A production inspection is designed to inspect the production portions of an NRS and is a limited purpose inspection. NRD COs may include production inspections as an integral part of the NRD's inspection cycle, if necessary. The inspection aids in the identification of problems and must be conducted when an NRS does not achieve new contract objective for 2 consecutive months. Production inspections are conducted using the priority one items from the most current MITT checklist. One waiver of a production inspection may be given in writing by the EPO for extenuating circumstances for an NRS. An NRS may never go 3 consecutive months missing new contract objective without a production inspection being conducted. Authorized inspectors include the EPO, an assistance enlisted programs officer (AEPO), the CR, or a ZS from another zone. When the inspection is

conducted, the 2-month requirement starts over. The production inspection may be used by the ZS as a management tool. It also may be used for reference by inspectors and trainers. Corrective plans are developed by the responsible ZS in concert with the RINC of the inspected NRS. Corrective plans should be directed at the major cause(s) of production problems. Production inspections take priority over all other types of inspections.

YOUR ROLE AS THE INSPECTOR

You may be called upon to conduct a production or periodic inspection in another zone. You undoubtedly will need to perform turnover inspections. Before any inspection, we must adopt a certain mind-set. Remember the purpose of the inspection program—to identify deficiencies so they can be corrected. You may want to approach each type of inspection a bit differently. Production inspections, by their very nature, are more serious than a periodic or turnover inspection. The goal, however, is still to find ways to increase productivity and efficiency. Use the MITT inspection checklist. If you find something that doesn't look right, ask questions. Remember you are inspecting the billet and not the person. You want to refrain from any personal attacks on the RINC's and be sure not to countermand anything their chain of command may have required. Never argue; keep your demeanor pleasant but professional. Try not to editorialize. The inspection is for facts, not opinions. Look at the entire system as you inspect. Isolated errors do not always indicate a problem. Overall, you want to be helpful. The way you communicate your ideas to the RINC's will determine how much they decide to take on board.

YOUR ROLE AS THE INSPECTEE

Everyone takes their turn as the recipient of an inspection. Look on it as an opportunity to shine and possibly learn some new ideas that will help your recruiters become more successful. Keep an open mind. We advise those inspecting not to personalize the inspection. When you are being inspected, the reverse is true. The inspection is a reflection of the job you do every day. Take it personally. If mistakes are found, systems are discovered to be dysfunctional, or any discrepancies are noted, take the responsibility. Whether you are the RINC or the ZS, take the rap. On the other hand, if you feel a discrepancy is being unduly written, speak up. If you can show the inspector the discrepancy does not exist, he or she will normally remove it from your report. Again, the way you communicate will go

a long way in finding an open mind. Don't argue. Simply present your case professionally. Review the MITT inspection checklist before you are inspected. Try to have as much of the information the inspector will need readily available. If possible, lay out reports, logs, and other inspection items on a table or desk where you want the inspector to work during his or her stay. Greet the inspector as a shipmate instead of the enemy. Remember—you too, will have to till the role of inspector at some point.

INSPECTION REPORTING AND TRACKING

Original inspection reports are maintained at the NRS for 3 years. ZSs should maintain the original ZS inspection report in their office. Copies of all inspection reports are sent to the CO via the chain of command for review. The EPO will maintain the copy on file at the NRD for 3 years. The CR makes sure corrective action plans are developed by the appropriate supervisors to correct problems and deficiencies noted during all NRS inspections. There is no required format for the corrective action plan as long as it is written and implemented. Supervisors may want to make a formal POA&M or simply a written plan to correct the deficiencies. All personnel involved with the corrective action should receive a copy of the plan. Make sure all concerned understand their responsibilities and the overall goal of the corrective action plan. ZSs initiate inspection report discrepancy tracking sheets listing the discrepancy number and the date corrected and submit them monthly to the CR until all discrepancies have been resolved.

ZONE PRODUCTION AND PLANNING MEETINGS

Zone production and planning meetings fulfill a variety of purposes. Training, production review, and goal setting can all be accomplished at the meeting. They provide an excellent time to give public recognition. The meetings can be used for group problem solving and provide an increased opportunity for team building. All major sales forces have some sort of meeting or conference to discuss production, planning, and generally stir up the fires of motivation. These meetings are especially important because recruiters are scattered around. Enthusiasm and momentum can often be reclaimed as the result of getting together with a group of one's own. Effective meetings are well-thought-out and follow set rules and agendas. We'll cover those considerations, your role as

a facilitator, and situational meetings in the following paragraphs.

CONSIDERATIONS

When planning your zone meetings you should consider several factors. You must decide on the frequency, format, and meeting place and time.

Frequency of Meetings

Most ZSs hold production and planning meetings monthly. However, if your zone covers a large geographical area, you may need to meet less often.

Format

The format of your meeting will depend on the planned agenda. You can choose between a classroom lecture type of format or more of a round table, guided discussion format.

Place and Time

The meeting place should be as convenient to all as possible. Pick a central site or try to rotate the location between the stations. Look around for appropriate facilities. RINC's usually have contacts for free meeting sites they use for their DEP meetings. Schools, fraternal and veterans' organizations, Reserve centers, and government buildings are all usually more than happy to let you use their facilities. Set your meeting time to avoid getting recruiters on the road too early or keeping them on the road late at night.

SET GROUND RULES

You should establish ground rules for zone meetings so everyone understands your policy on attendance, participation, courtesies, assignments, breaks, and interruptions.

Attendance/Promptness

There should be no question in the recruiters' minds that attendance is mandatory at these meetings. Have RINC's clear exceptions with you in advance. Make sure everyone understands promptness is important. Delaying the meeting will eat up everyone's time.

Participation

Encourage total participation of all assigned. Every RINC and recruiter are important to the team and should be urged to participate in planned training as well as impromptu ideas and solutions. Draw out the quiet ones.

Courtesies

Explain that common courtesies cannot be overlooked. The golden rule is in effect. Also remind personnel of the sensibilities of others.

Assignments

Share the podium. Assign training to others in the zone, especially those RINC's who may be aspiring for increased responsibility. Recruiters who have proven successful in an area should be encouraged to share that knowledge with others. Another tactic is to have someone train in areas in which they themselves may need help. They will be forced to research and may concentrate long enough in their preparation to train themselves in the process.

Breaks

If your meeting is going to be over an hour long, schedule breaks. They should be at least 10 minutes out of every hour.

Interruptions

Set a policy for interruptions. If you want them to feel free to interrupt you during the training, let them know. On the other hand, if you would prefer to take questions and comments only at the end of your training, say that too. Under no circumstances should you allow zone members to interrupt each other.

SETTING AN AGENDA

Well-planned meetings must include an agenda. This provides you with a set plan of the topics you want to cover and the order in which you want to cover them. Figure 9-2 shows a sample agenda for a zone meeting. This meeting will start with an awards presentation by the CO to get everyone motivated. The ZS then plans to lead the RINC's in a production review and planning session. After that, three topics required by this month's training plan will be covered-two by RINC's and the other by the ZS. A military entrance

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<u>TIME</u>	<u>SUBJECT</u>	<u>PRESENTER</u>
0830	Awards Presentation	CO
0900	July Production Review	ZS/RINC's
0930	August Goals	ZS
1000	Market Analysis/SMART	DP1 SMYTHE
1030	Prospecting	RM2 JONAS
1100	Daily Production Review	ZS
1130	Kit Quality Control	PN1 TIPE (MEPS)
1200	Review/Critique	

Figure 9-2.-Sample zone meeting agenda.

processing station (MEPS) processor has been invited to provide kit quality training. Time is scheduled for a quick review and critique before adjourning the meeting at lunchtime. This schedule allows RINC's and recruiters ample time to get together after the meeting for lunch. You may find more solutions are found during these informal get-togethers than at the actual training evolution. You may want to encourage this by setting up a luncheon following training yourself, or enlisting the aid of a RINC or two to instigate the get-together. Because of the distance between stations, zone meetings may provide the only opportunity for some recruiters and RINC's to enjoy this type of fellowship.

Distribute in Advance

Send a copy of your agenda to each RINC and out-of-zone participant well in advance of the scheduled meeting. This allows everyone enough time to think of questions and input they may have on the topics you are going to present.

Topics

Choose topics for training from the NRD annual training plan and add your zone requirements as determined by your production reviews, station visits, and activity analysis.

Presenters

As suggested in chapter 2, add some variety to your meetings by inviting others to present training topics. Call on RINC's, NRD staff, and MEPS personnel to present training.

Time Guidelines

Set time guidelines and stick to them. This allows for better planning for attendees. Try not to exceed 4 hours for training. Attention spans tend to wane after that.

Warm-Up

Plan some type of warm-up for the meeting. The warm-up should be something that will bring the group together, encourage participation, and enhance morale. A group congratulations for achieved success makes a motivating warm-up. If congratulations are not in order, try something that focuses on planned improvement.

Review of Agenda

Take a few minutes to review the meeting's agenda so everyone knows what to expect.

Break

Schedule hourly breaks of at least 10 minutes.

Meeting Evaluation

Set some time aside for meeting evaluation. Ask participants how they feel the training went. Ask them if they have suggestions for future meetings. Get feedback.

YOUR ROLE AS A FACILITATOR

Assume the role of facilitator whenever possible during your zone meetings. This is an especially

effective technique during production review and planning. Ask open-ended questions designed to stimulate conversation. Let RINC's arrive at their own conclusions about what went wrong or right. Ask for ideas from other RINC's when problems surface from a RINC who needs input. Joint problem solving is usually helpful to others in the group who can put the offered solutions to work in their stations, as well. By guiding the conversation, instead of monopolizing it, you are building teamwork and fostering ownership. Let everyone have a piece of the pie.

SITUATIONAL MEETINGS

Occasionally, you may need to hold situational meetings. You may need to get all RINC's together for special training or brainstorming. You may want to meet with all of those not yet qualified under the RQS. Plan and prepare for these situational meetings as you would a zone meeting. Make sure a meeting is needed then plan your agenda.